AUNZ Market Demographics

Travel gender: 37% male 63% female

Av. Traveler age: 45 (men) 44 (women)

Average annual income: $US61,000 (over 1 million have annual income over $200K)

Average party size: 3: AU Couples 43%, families with young children 26%, solo 26% (prosperous families, comfortable cruisers, young professionals). US one of top destinations for solo travel.

Av. length of stay: 17+ nights

Av. daily spend: $500+ (Australians stay longer, spend more than other markets)

Av. annual paid time off: 28 days

Travel preference: Fly, self-drive; small group touring increasing in popularity

Seeking: Sightseeing, shopping, national parks /monuments, cultural/historical landmarks and museums, movie & TV landmarks, local lifestyle; destination-centric experiences, ski/snowboarding (winter).

AUNZ Market Trends

- Maintaining strong trends in the market: Set-jetting (core), Luxury (new definition), Wellness (re-set recharge trend), Bleisure (AU-led 6 nights vs3.5), Culinary, Sustainable Travel
- Emerging trends: Live tourism(events eg mega concerts to meteor showers, Sportscations (eg Rugby in Vegas, FIFA WC, 28 Olympics) Holiday Hacking (89% use this to save time, $), AI tailored content, price options, developing search tools etc.
- A willingness to spend on quality experiences that enhance their travel. 43% AU will spend more 2025.
- Travel is the No.1 priority in discretionary spending
- 1 in 2 are loyalty program members and choose to book and pay more with that brand.
- 83% use airline websites & spend 40+ days when planning, and are open to inspiration on destination
- We visit year-round and book 3 months in advance.
- 1.31m Aussies+ Kiwis visited in 2024 up 6.3 % on 2023 and NTTO expects to pass 2019
- visitation this year. AU in 11th place for visitation Source: Brand USA AUNZ update Feb 25

AUNZ Market Updates

- Both AU and NZ economies continue to recover and looking more positive in 2025. AU Reserve Bank has made first rate cut (now 4%) since pandemic this Feb.
- AUD exchange rate has been around USD 0.62-0.64c but despite strength of USD, are still prioritizing travel.
- Visitation continues to grow, up a combined 6.3% in 2024 for Oceania region
- Increased flight capacity, new routes (Delta, AA, Fiji, Qantas), lower fares. BRIS fastest growing hub +125%
- Qantas +13% seat capacity, 30% more premium seats
- Auckland's North American routes + 48% & expanded connectivity for

  the non eastern states with Virgin partnership.

AUNZ Market Updates (contd)

- Trade landscape more complex with both consolidation and fragmentation across distribution system.
- Consumers more informed, demanding and want flexibility and value in response to economic pressure and shifting preferences
- Consumers & agents have more options & channels to book
- Rise of b2b platforms Expedia Tap Ready Rooms, Beds Online offer options for comparison on best deal
- Social commerce and AI driving personalization at scale enabling dynamic pricing
- Agents continue to be major influence on consumer decisions & are

  either novices or 3-5 yrs experience and need appropriate training for both

AUNZ Market Fun Facts

Aussies and Kiwis :

Love a hot breakfast (brekky) included in the rate, tea-making facilities & keen to have espresso coffee (flat white) available (we're the worst coffee snobs)!

Distance calculated in kilometers not miles, and we drive on the left, not right. Mostly not used to driving in snow/winter conditions.

Like to dine outdoors and take time over a meal. Entrée in AU means appetiser and our main course is the US entrée. We like drinks offered and served before our meal. We are interested in fresh local dining & produce & portions are smaller at home than in the US.

Connectivity is important. We are huge users of mobile phones and the internet!

We enjoy a chat, meeting the locals and hearing your recommendations ☺.
Aussies also have a lot of slang and love to shorten names: Barry: Bazza, Caroline: Cazza, BBQ: barbie, Afternoon: arvo Sharks: Noahs
If we like you (or cannot recall your name), we will call you 'mate'
and Kiwis may call you 'bro'